

## Attachment 6

# Monthly Progress Report: June 2025

AK DPA Medicaid Eligibility Support Services  
Project

June 2025



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## EXECUTIVE SUMMARY

- ✓ **584,973** have been handled by PCG Supervisors and Eligibility Associates since June 2023
  - **26,137 calls** were handled by PCG Supervisors and Eligibility Associates during the month of June
  - The queue with the highest number of calls was the General Inquiry line with **22,400**
- ✓ Medicaid Renewal Project
  - Completed Procedural Closures for **2,023** clients
  - Completed Pre-Work for **6,259** cases
- ✓ Pregnant Women/Newborn Cases
  - Completed **97** PW/NB tasks
- ✓ Import Review
  - Completed **11,187** self-report submissions
  - Completed **260** FFM and SSP Application registrations
- ✓ Returned Mail
  - Staff completed **533** RM tasks
- ✓ Quality Assurance (QA) Results
  - Two hundred ninety-one (**291**) QA evaluations were completed in June

## MONTHLY REPORTING

### VCC PROGRESS

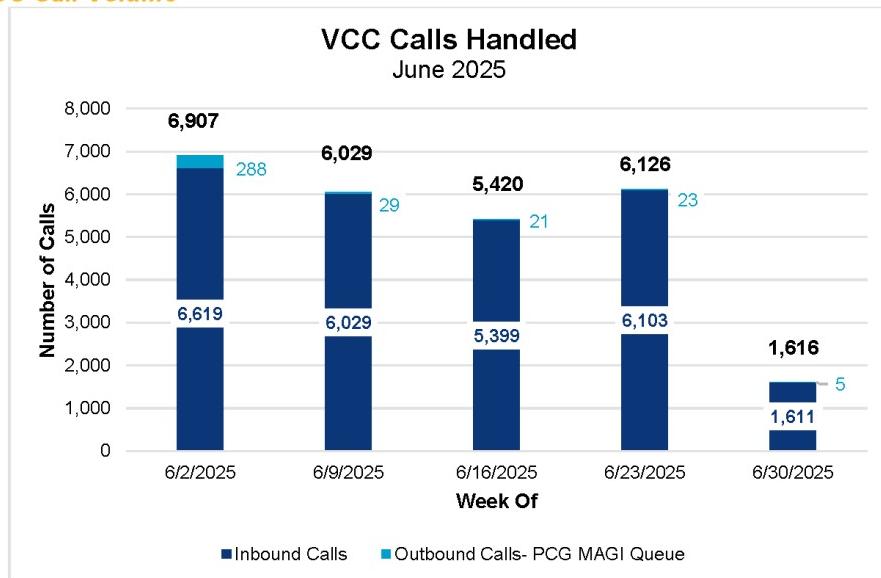
This section provides monthly metrics and trend analysis week over week. Reporting content includes call volume data, queue performance metrics, and key performance metrics by week. The monthly trend analysis includes call volume data and key performance metrics month over month.

#### *June Data*

##### Key Takeaways:

- ✓ **26,127 calls** were handled by PCG Supervisors and Eligibility Associates during the month of June.
- ✓ The highest number of total calls handled was the week 06/02/2025 with **6,907 calls**.

### VCC Call Volume



### Queue Performance Metrics

The tables below display performance metrics for each queue. Tracking metrics for each queue can ensure that the allocation of staff is appropriate.

#### Important Notes:

- The queue performance metrics for June do not include data for any staff that separated from the project prior to the data pull. Staffing changes that occurred after this data pull have not yet been removed from the system and are included in the data.
- 06/16/2025 was a four-day week. 06/30/2025 was a one-day week

### General Inquiry

Week Of	Calls Handled	ASA	Average Wait	Average Handle	Average Talk	Average Hold
6/2/2025	5,719	4m 48s	4m 43s	7m 30s	4m 45s	5m 45s
6/9/2025	5,210	1m 24s	1m 25s	7m 7s	4m 40s	5m 24s
6/16/2025 (4 workdays)	4,743	1m 21s	1m 22s	6m 46s	4m 25	5m 28s
6/23/2025	5,307	3m 25s	3m 23s	7m 45s	5m 5s	6m 15s
06/30/2025 (1 workday)	1,421	3m 50s	3m 45s	7m 22s	4m 57s	5m 38s
<b>Average/Total</b>	<b>22,400</b>	<b>2m 57s</b>	<b>2m 56s</b>	<b>7m 18s</b>	<b>4m 46s</b>	<b>5m 42s</b>

**After 3PM Phone Calls**

Week Of	Calls Handled	ASA	Average Wait	Average Handle	Average Talk	Average Hold
<b>6/2/2025</b>	362	2m 56s	3m 31s	7m 55s	5m 35s	5m 11s
<b>6/9/2025</b>	330	3m 18s	3m 44s	8m 13s	5m 39s	6m 4s
<b>6/16/2025 (4 workdays)</b>	272	2m 5s	2m 45s	7m 43s	5m 19s	5m 33s
<b>6/23/2025</b>	301	3m 27s	5m 8s	7m 50s	5m 21s	5m 34s
<b>06/30/2025 (1 workday)</b>	86	1m 57s	2m 3s	7m 23s	5m 13s	5m 39s
<b>Average/Total</b>	<b>1,351</b>	<b>2m 45s</b>	<b>3m 26s</b>	<b>7m 49s</b>	<b>5m 25s</b>	<b>5m 36s</b>

**Telephonic Applications**

Week Of	Calls Handled	ASA	Average Wait	Average Handle	Average Talk	Average Hold
<b>6/2/2025</b>	128	4m 29s	4m 29s	18m 59s	16m 25s	8m 50s
<b>6/9/2025</b>	124	4m 1s	4m 33s	20m 59s	18m 11s	5m 54s
<b>6/16/2025 (4 workdays)</b>	99	8m 51s	9m 10s	27m 13s	23m 58s	8m 31s
<b>6/23/2025</b>	117	8m 24s	8m 14s	17m 52s	16m 1s	6m 47s
<b>06/30/2025 (1 workday)</b>	24	12m 35s	13m 45s	31m 22s	24m 18s	10m 47s
<b>Average/Total</b>	<b>492</b>	<b>7m 40s</b>	<b>8m 2s</b>	<b>23m 17s</b>	<b>19m 46s</b>	<b>8m 10s</b>

**PCG MAGI**

Week Of	Calls Handled	Average Handle	Average Talk	Average Hold
<b>6/2/2025</b>	288	1m 16s	1m 0s	0m 71s
<b>6/9/2025</b>	29	1m 48s	1m 20s	4m 39s
<b>6/16/2025 (4 workdays)</b>	21	1m 40s	1m 32s	48s
<b>6/23/2025</b>	23	1m 10s	52s	25s
<b>06/30/2025 (1 workday)</b>	5	1m 12s	35s	0s
<b>Average/Total</b>	<b>366</b>	<b>1m 25s</b>	<b>1m 4s</b>	<b>1m 10s</b>

**LTC Routing Assistance Needed**

Week Of	Calls Handled	ASA	Average Wait	Average Handle	Average Talk	Average Hold
<b>6/2/2025</b>	399	3m 16s	3m 34s	2m 26s	1m 55s	2m 41s
<b>6/9/2025</b>	356	3m 2s	3m 8s	5m 15s	1m 48s	1m 29s
<b>6/16/2025 (4 workdays)</b>	277	5m 11s	5m 20s	3m 9s	2m 6s	3m 6s
<b>6/23/2025</b>	362	4m 3s	4m 14s	2m 44s	2m 3s	1m 37s
<b>06/30/2025 (1 workday)</b>	77	4m 50s	4m 33s	2m 51s	1m 58s	1m 10s

Average/Total	1,471	4m 4s	4m 10s	3m 17s	1m 58s	2m 1s
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**PHE Unwinding**

Week Of	Calls Handled	ASA	Average Wait	Average Handle	Average Talk	Average Hold
6/2/2025	11	2m 22s	3m 58s	5m 44s	3m 54s	4m 0s
6/9/2025	9	2m 37s	2m 21s	3m 51s	3m 10s	0s
6/16/2025 (4 workdays)	8	2m 21s	23m 24s	7m 27s	6m 5s	2m 59s
6/23/2025	16	6m 21s	8m 4s	6m 1s	4m 54s	4m 55s
06/30/2025 (1 workday)	3	34m 12s	26m 4s	4m 22s	4m 4s	0s
Average/Total	47	9m 34s	17m 46s	5m 28s	4m 25s	2m 22s

**Key Performance Metrics**

Week Of	Number of Staff Taking Calls	EA Calls Handled Total	Average Speed of Answer	EA Average Talk Average (min)	EA Average Hold Average (min)	EA Average ACW Average (min)
6/2/2025	96	6,907	4m 3s	6m 31s	5m 18s	30s
6/9/2025	111	6,058	3m 2s	6m 42s	3m 46s	1m 1s
6/16/2025 (4 workdays)	103	5,420	8m 24s	8m 22s	5m 7s	28s
6/23/2025	89	6,126	5m 49s	6m 41s	5m 1s	25s
06/30/2025 (1 workday)	91	1,616	10m 2s	8m 6s	10m 40s	20s
Average/Total	98	26,127	5m 19s	7m 4s	4m 48s	36s

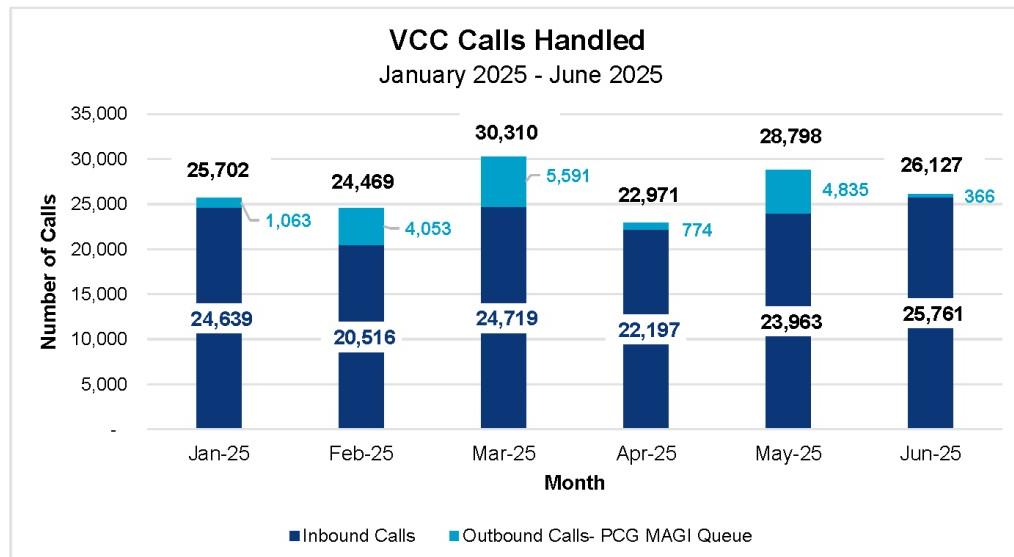
**Weighted Averages**

Below is a table of weighted averages for applicable metrics from the table above. The weighted averages below consider the varying degrees of call volume experienced across all five queues.

Week Of	Average Speed of Answer	EA Average Talk Average	EA Average Hold Average (min)	EA Average ACW Average
6/2/2025	4m 31s	5m 3s	5m 34s	25s
6/9/2025	1m 35s	4m 33s	5m 11s	34s
6/16/2025 (4 workdays)	1m 36s	4m 22s	5m 16s	25s
6/23/2025	3m 25s	4m 53s	5m 49s	25s
06/30/2025 (1 workday)	3m 48s	4m 49s	5m 20s	24s
Average/Total	2m 46s	4m 42s	5m 28s	27s

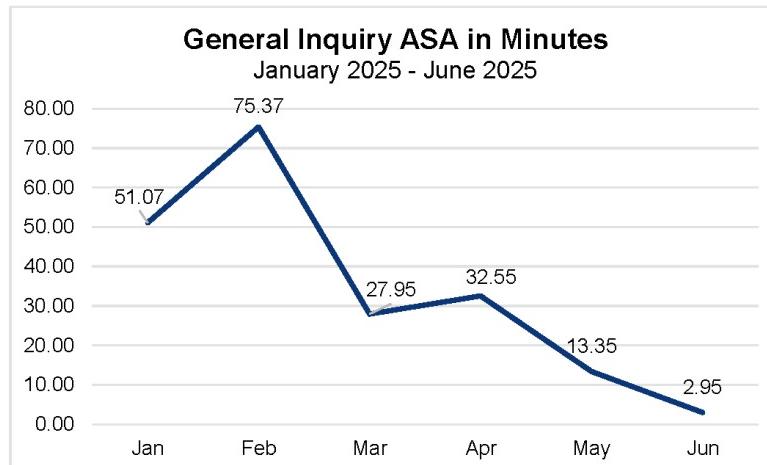
**Monthly Trend Analysis**

### VCC Call Volume



### Average Speed of Answer

Starting in May 2025, PCG implemented a “VCC Load” schedule to always keep ASA below 15 minutes during business hours. Each EA worked approximately 1.5 hours on the VCC regardless of their standard assignments. As a result, ASA dropped from 33 minutes in April to 13 minutes in May. ASA dropped further in June to 3 minutes.



### Key Performance Metrics

The number of staff making calls represents every staff member that was on the VCC line during a given month, it does not necessarily reflect the average number of staff taking calls on any given day.

Month	Number of Staff Taking Calls*	EA Calls Handled Total	EA Average Talk (Minutes)	EA Average Hold (Minutes)	EA Average ACW (Minutes)
January 2024	58	26,028	6.83	4.65	1.05
February 2024	57	21,164	6.73	4.48	0.33
March 2024	65	20,092	6.81	4.34	0.44
April 2024	61	19,146	6.21	4.03	2.81
May 2024	67	16,250	6.23	4.11	0.53
June 2024	65	18,360	7.16	3.84	0.55
July 2024	70	20,891	7.68	4.99	0.47
August 2024	71	19,414	7.41	3.36	0.49
September 2024	70	17,064	4.02	3.74	0.50
October 2024	75	18,073	6.37	4.47	0.41
November 2024	66	18,258	6.38	3.83	0.51
December 2024	95	20,505	5.56	4.88	0.47
January 2025	120	25,746	6.81	5.09	0.76
February 2025	120	24,569	6.57	4.66	0.92
March 2025	104	30,310	6.63	4.30	0.68
April 2025	110	22,971	6.80	4.45	1.31
May 2025	107	28,798	6.50	4.20	1.32
June 2025	106	26,137	7.07	4.80	0.60
Average	83	21,544	6.56	4.42	0.82

### **Data Definitions**

**Calls Handled** – Sum of calls answered and called back

**Average Talk** – Daily Average of time taking a call

**Average Hold** – Daily average of time a caller is on hold

**Average ACW** – Daily average of time before returning to available status after a call ended

**Average Speed of Answer** – Speed in which the call is answered

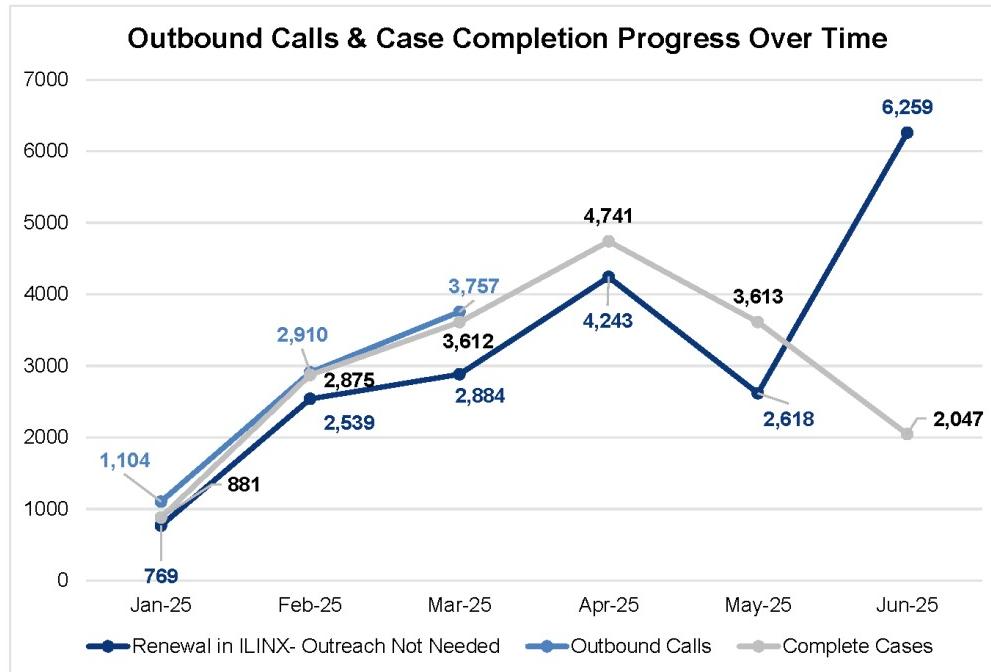
**Active Staff** – Eligibility Associates who handled at least one call during reporting period

## ELIGIBILITY

### MEDICAID RENEWAL PROJECT

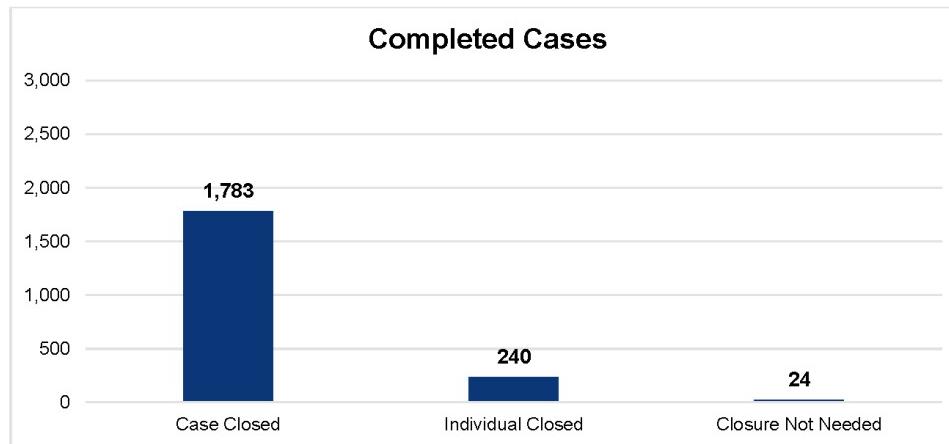
Using a list provided by the Department of Public Assistance leadership, the *Eligibility* team will determine if each client has submitted a timely Eligibility Renewal Form, closing any case that does not have a complete renewal. Cases with completed renewals remain open and waiting for renewal determination by Eligibility Technicians. In the month of June Eligibility Associates worked lists from September and October 2024 in addition to June 2025. As a result, a higher proportion of cases were previously worked or had waiting renewals.

#### *Renewal Project Progress Over Time*



#### *Completed Cases*

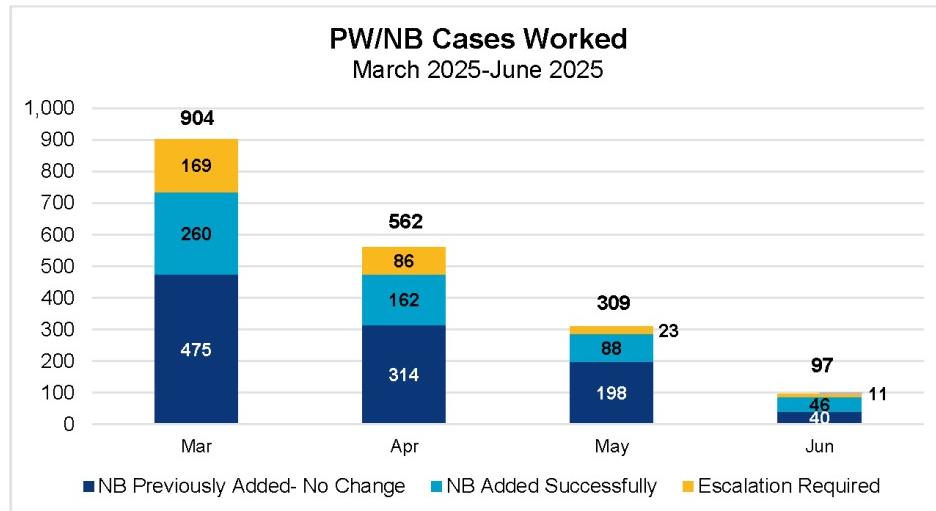
- ✓ Due to lack of Eligibility Renewal Forms, EAs closed 2,023 cases in June
- ✓ One thousand seven hundred eighty-three (1,783) resulted in full case closure



#### PREGNANT WOMEN/NEWBORN CASES

Staff worked 97 cases in the month of June from one list.

- ✓ List provided on 06/06/2025 and completed 06/18/2025



## IMPORT REVIEW

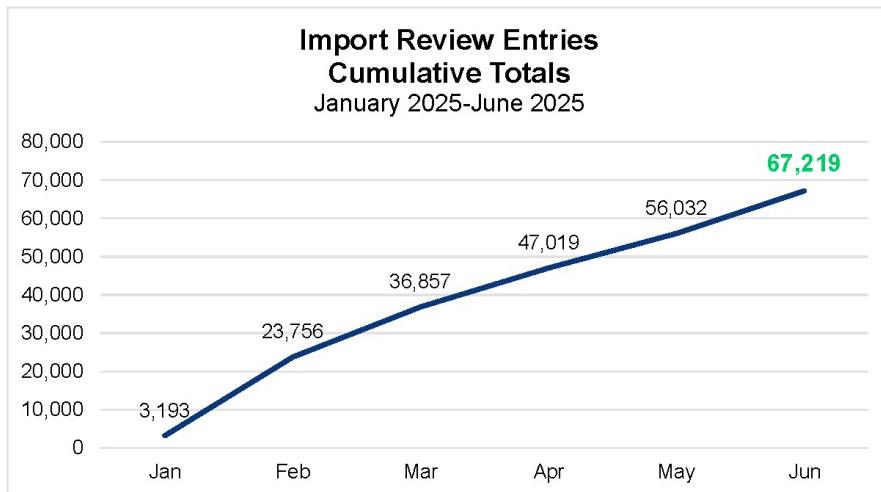
### Key Takeaways:

- ✓ IEVS numbers are now included in the total Import Review numbers
- ✓ IR staff completed **11,187 self-report forms** in the month of June.
  - IR staff have completed over 121,000 entries since August 2023
- ✓ RM staff completed **533 tasks** in June
- ✓ FFM staff completed **260 FFM and SSP registrations** in June

## CLIENT DOCUMENT IMPORT

PCG uses Current tasks entered in by the IR Team for the month to track productivity. Additional data points are collected using a PCG created self-report Microsoft Forms tool. Each EA submits the form to capture what action was taken with the document after each item is complete

### *Monthly Trends*



## FFM REGISTRATION

PCG began registering Medicaid applications from the Federally Facilitated Marketplace (FFM) and Self-Service Portal (SSP) on 3/14/2025. Staff are assigned new applications every Friday and completed 260 applications in June.

Outcome	Total
Fully Registered	139
Already Registered- No Action	94
Stopped at Case Association	20
Other	7
<b>Total</b>	<b>260</b>

Note: Other submissions include cases that need additional review from supervisors, parsing errors, and System Support escalations

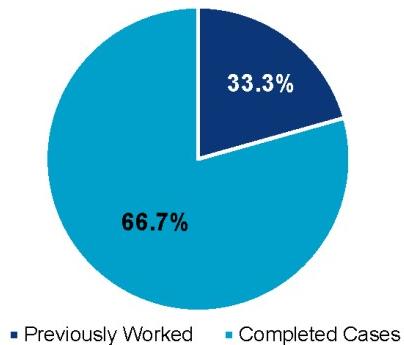
#### RETURNED MAIL

Staff continued to work RM in June. Once the initial backlog was completed, Returned Mail was paused temporarily while determining an updated procedure for new items coming in as a result of notices sent for previous Returned Mail.

Supervisors and EAs completed **533 Returned Mail items** in June.

- Reviewed, No Further Action Needed- **110**
- Completed Cases- **423**

**Breakdown of Returned Mail Items Worked**  
June 2025



## ESCALATION DATA

Escalation Requests needing additional action are sent to Alaska leadership daily. This report will include the metrics and analysis of program type(s) and reason for escalation.

### PROGRAM TYPE

#### Key Takeaways:

- ✓ One hundred eighty (180) total programs associated with escalation requests were reported by PCG staff and sent to Alaska leadership in June.
- ✓ *FS* was the highest reported program, with 138 total requests.
- ✓ *HAP* was the lowest reported program type, with 2 requests.

Program Type	Total Reports
<i>FS</i> - Food Stamps	138
<i>ME</i> - Medicaid	21
<i>AP</i> - Adult Public Assistance	11
<i>PEBT</i> - Pandemic EBT	5
<i>GA</i> - Other	4
<i>TA/AF</i> - Temporary Assistance	4
<i>HAP</i> - Heating Assistance	2
	180

### REASON FOR ESCALATION

#### Key Takeaways:

- ✓ *Benefits not authorized/received* were the highest reported escalation, with 96 total requests.
- ✓ *Returned Mail* was the lowest report escalation, with 2 requests

Reason for Escalation	Total Reports
<i>Benefits not authorized/received</i>	96
<i>Application/recert/FSP95 not worked</i>	52
<i>PHI updates- name, DOB, SSN, etc.</i>	43
<i>Other</i>	21
<i>Case closed in error</i>	11
<i>PEBT</i> - Pandemic EBT	4
<i>Returned Mail</i>	2
	229

### END OF DAY CALLS

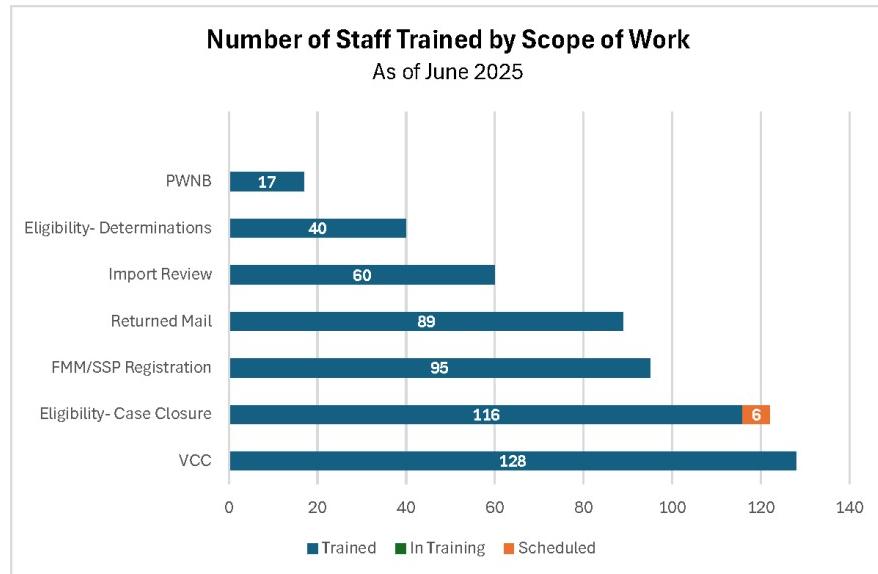
#### Key Takeaways:

- ✓ Staff completed 136 total End of Day calls in June
- ✓ 89 calls were in the *Medicaid Queue*, 45 calls were in the *Scheduled Interview Queue*, and 2 calls were in the *Missed Interview Queue*

## TRAINING

### Key Takeaways:

- ✓ 40 staff participated in two Eligibility Determination Refresher trainings in June
  - Once staff have access to SAM they will be able to make recertification determinations
- ✓ As of 07/09/2025, Nathaniel Trombley and the AK IT team continued to work on the ticket to troubleshoot SAM loading errors while on the VPN



Note: Staff totals only include currently active staff and do not account for terminations and separations.

## QUALITY ASSURANCE

### Key Takeaways:

- ✓ Supervisors completed **291 evaluations** in the month of June.
  - General Inquiry- 127 evaluations with an average score of 95%
  - Telephonic Applications- 14 evaluations with an average score of 98%
  - Import Review- 43 evaluations with an average score of 93%
  - Medicaid Renewal Project- 75 evaluations with an average score of 88%
    - Excluding 8 cases closed in error (an automatic zero score), the remaining 67 evaluations had an average score of 99%
  - Returned Mail Project- 32 evaluations with an average score of 91%

### GENERAL QUALITY ASSURANCE

Public Consulting Group (PCG) is responsible for providing QA for the Alaska DPA Eligibility Support Project. For sole VCC staff, PCG provides call QA for at least **two (2) phone calls per staff member per month**. For any staff member with more than one assignment in a given month, **a combination of at least three submissions is completed encompassing all assigned responsibilities**. Please note that not all staff members will have calls/submissions to review depending on their work assignment over the course of the month; this also includes those who are in various training groups.

**The goal for all QA Evaluations is 90% or higher.** Supervisors will review QA results with staff on an individual level to ensure that they are aware of their performance and to provide coaching on areas for improvement. If call QA results do not meet this threshold at the project and individual levels, PCG will:

- Ensure that supervisors review results thoroughly with direct reports to determine next steps for improvement
- Develop additional resources to support staff Results

### Evaluation Data and Feedback Loop

#### Areas for Improvement

Continued training and coaching will occur for new IR staff with an evaluation scoring under 90%. In addition to coaching or new IR staff, continued training and coaching will occur for existing staff that scored below 90% for any QA evaluation.

#### Action Steps

**For PCG Eligibility Associates with average scores of 84% and below, action steps remain unchanged:**

#### Education Review and Coaching

Supervisors to schedule one on one time to review any education, coaching, or additional support needs to address quality issue(s) identified

- Two educational training sessions developed which focus on process improvement within the identified scope
- For eligibility work- an automatic zero evaluation will result in an education review and coaching. If another evaluation in the next two months results in an automatic zero a Performance Improvement Plan will be issued.

#### Performance Improvement Plan

- Issued to clarify expectations of acceptable performance and/or conduct, develop an action plan for improvement, and give the employee time to correct the issues before moving to formal corrective action

**For PCG Eligibility Associates with average scores of 85% and above:**

**Education Review and Coaching**

Supervisors schedule one on one time to review any education, coaching, or additional support needs to address quality issue(s) identified

- Eligibility Associates will be coached to overall goal of achieving 90% as mentioned in the PCG QA Guide

## APPENDICES

### APPENDIX A – EVALUATION CHECKLISTS

Phone calls are evaluated on a random basis. The checklists are a representation of the QA Evaluation forms and have been formulated to cover most situations encountered across PCG responsibilities.

- General Inquiry
- LTC
- PHE Unwinding
- After 3:00pm Calls
- Telephonic Application
- Import Review
- Case Closures
- Returned Mail

Below are the checklists. These checklists are adjusted over the course of the project, if needed or requested. Please note that checklists may not be entirely applicable to every submission, and some checklist items are omitted from the total possible score based on the individual nature of the submission. Also, some questions hold a heavier weight, particularly in the client verification section.

#### *General Inquiry, LTC, PHE Unwinding & After 3:00PM Calls Checklist*

<b>Client Greeting and Initial Verification (4 questions)</b>	
<b>1.1</b>	Was the call answered promptly?
<b>1.2</b>	Did the EA introduce themselves with their first name?
<b>1.3</b>	Did the EA identify they were calling from the SOA (State of Alaska) or Division of Public Assistance?
<b>1.4</b>	Did the EA follow the opening script, asking for a case number or an SSN to look up the case?
<b>Verifying the Caller (3 questions)</b>	
<b>2.1</b>	Did the EA verify the client's full name?
<b>2.2</b>	Did the EA verify the client's date of birth?
<b>2.3</b>	Did the EA verify the client's address and phone number?
<b>2.4</b>	Did the EA verify all other necessary information for the call?
<b>Client's Needs (5 questions)</b>	
<b>3.1</b>	Did the agent use active listening skills?
<b>3.2</b>	Did the agent communicate with the caller appropriately?
<b>3.3</b>	Did the agent use proper hold procedures by asking the caller to please hold, thank you for holding etc. when necessary?
<b>3.4</b>	Did the agent set clear expectations as available?
<b>3.5</b>	Did the agent transfer the call to the appropriate department (as necessary)?
<b>Call Resolution and Troubleshooting (3 questions)</b>	
<b>4.1</b>	Was the agent able to resolve the call?
<b>4.2</b>	Did the agent provide correct explanations to the caller?
<b>4.3</b>	Did the agent relay information to the appropriate parties only?
<b>Customer Service Practices (4 questions)</b>	
<b>5.1</b>	Did the agent speak clearly, audibly, and slowly?
<b>5.2</b>	Did the agent communicate with the client appropriately, while adjusting their communication style based on direction of the call?
<b>5.3</b>	Did the agent show they were willing to help?

**5.4** Did the agent lead the call to ensure optimal call handling time without rushing the caller?

**5.5** Was the agent's background noise at an appropriate level for the duration of the call?

#### Closing the Call (3 questions)

**6.1** Did the agent ask if the caller had any other questions?

**6.2** Did they thank the customer for calling?

**6.3** Did they wait for the caller to hang up first?

#### Post-Call Tasks (2 questions)

**7.1** Did the agent complete all post-call actions on the account if necessary? Actions include, but are not limited to, uploading and classifying documents, changing address or phone number, creating CANO, etc.

**7.2** Did the agent disposition the call appropriately?

### **Telephonic Applications Checklist**

#### Client Greeting and Initial Verification (3 Questions)

**1.1** Did the EA introduce themselves with their first name?

**1.2** Did the EA say, "Thank you for calling the State of Alaska or the Department of Public Assistance?"

**1.3** Did the EA start by asking for a case number or an SSN to look up the case?

#### Verifying the Caller (3 Questions)

**2.1** Did the EA verify the client's full name?

**2.2** Did the EA verify the client's DOB?

**2.3** Did the EA verify the client's address and phone number?

**2.4** Did the EA verify all other necessary information for the call?

#### Call Resolution and Troubleshooting (4 Questions)

**3.1** Did the agent ask all appropriate questions related to the application they were filling out?

**3.2** Did the agent provide correct explanations to client questions?

**3.3** Did the agent relay information to the appropriate party only?

**3.4** Did the agent transfer the call to Medicaid (emergent needs only)?

#### Customer Service Practices (5 Questions)

**4.1** Did the agent speak clearly, audibly, and slowly and/or use Tele Language Line as necessary?

**4.2** Did the agent communicate with the client appropriately, while adjusting their communication style based on direction of the call?

**4.3** Did the agent lead the call to ensure optimal call handling time without rushing the caller?

**4.4** Did the agent communicate with the caller in a pleasant manner?

**4.5** Did the agent use proper hold procedures by asking the caller to please hold, thank you for holding, checking in with the caller etc.; when necessary?

**4.6** Was the agent's background noise at an appropriate level for the duration of the call?

#### Closing the call and Post-Call Tasks (5 Questions)

**5.1** Did the agent take the telephonic signature correctly?

**5.2** Did they thank the client for calling?

**5.3** Did the agent ask if the caller had any other questions?

**5.4** Did the agent register the application in the appropriate systems? (Aries, EIS, ECOS)

**5.5** Was the application registered correctly?

### **Import Review Submission Checklist**

<b>ILINX (4 questions)</b>	
<b>1.1</b>	Is the CID correct?
<b>1.2</b>	Is the Confidential Client marked appropriately if necessary?
<b>1.3</b>	Is the Received Date accurate?
<b>1.4</b>	Is the document organized into separate case files and classified appropriately?
<b>Application Registration (5 questions)</b>	
<b>2.1</b>	EIS - Were all application registration steps completed appropriately? <ul style="list-style-type: none"> <li>• Identifiable application</li> <li>• Correct case number(s)</li> <li>• Correct HH members</li> <li>• Correct program(s) selected</li> <li>• Correct start date</li> <li>• Correct contact information (ADDR)</li> <li>• Correct CARC(s)</li> </ul>
<b>2.2</b>	ECOS - Were all application registration steps completed appropriately? <ul style="list-style-type: none"> <li>• Identifiable application</li> <li>• Correct case number(s)</li> <li>• Correct HH members</li> <li>• Correct start date/application year</li> <li>• Correct contact information</li> </ul>
<b>2.3</b>	ECOS - For tribal card holders- was the application forwarded to the proper agency?
<b>2.4</b>	ARIES - Were all application registration steps completed appropriately? <ul style="list-style-type: none"> <li>• Identifiable application</li> <li>• Correct case number(s)</li> <li>• Correct HH members</li> <li>• Correct start date</li> <li>• Application associated with existing cases</li> <li>• Correct contact information</li> </ul>
<b>2.5</b>	Was expedited procedure followed correctly?
<b>Recertification/Interim Reports (1 question)</b>	
<b>3.1</b>	Were all recertification/interim report steps completed appropriately? <ul style="list-style-type: none"> <li>• Case(s) RERE'd with correct received date</li> <li>• CARC(s) updated</li> <li>• Early Recert/Interim Report- not registered in EIS</li> <li>• ARIES Recert- not registered</li> </ul>
<b>Client Contact (2 questions)</b>	
<b>4.1</b>	Was the correct information relayed to the client?
<b>4.2</b>	Was the EA's response to the client professional?
<b>Clerical Actions (4 questions)</b>	
<b>5.1</b>	Were all clerical steps associated with the submission completed correctly?
<b>5.2</b>	Was the Current Task entered correctly?
<b>5.3</b>	Was supervisor cc'ed/bcc'ed on any email communication surrounding submission?
<b>5.4</b>	Was Import Review Form entered correctly?

### **Medicaid Renewal Project Checklist**

**Case Closure (12 Questions)**

- |             |   |
|-------------|---|
| <b>1.1</b>  | Did EA correctly determine the need for closure?  |
| <b>1.2</b>  | Did the EA correctly identify whether the case was a full household closure or individual closure?  |
| <b>1.3</b>  | For whole household closures, was the closure reason "Failure to return recertification packet" correctly selected?   |
| <b>1.4</b>  | If closure was for individual household members, did the EA change the living situation to "Child Living with Another Parent" on the living situation page? |
| <b>1.5</b>  | Were all ARIES errors cleared from the case?  |
| <b>1.6</b>  | Did the EA run wrap up the case?  |
| <b>1.7</b>  | Did the EA authorize all benefits?  |
| <b>1.8</b>  | Do the correct household members show closed as of the end of the month, or the following month if closure was after the Adverse Action date?               |
| <b>1.9</b>  | Did the EA add a CANO with the proper verbiage?   |
| <b>1.10</b> | Did the EA add the required Free Form Verbiage to the closure notice?   |
| <b>1.11</b> | For individual closures, did the EA add the required text regarding the household members whose benefits ended?   |

**Returned Mail Project Checklist****Returned Mail (12 Questions)**

- |             |  |
|-------------|--|
| <b>1.1</b>  | Was the CID in Current correct?  |
| <b>1.2</b>  | Was the case status identified correctly?                                    |
| <b>1.21</b> | Was the Intake Location updated to LTC in ILINX?                             |
| <b>1.3</b>  | If client contact is needed- Was the proper procedure followed for the call? |
| <b>1.4</b>  | Was the proper CANO template used for <b>Open</b> cases?                     |
| <b>1.5</b>  | Was the proper notice template used for <b>Open</b> cases?                   |
| <b>1.6</b>  | Was the proper due date used used for <b>Open</b> cases?                     |
| <b>1.7</b>  | Were addresses updated correctly for all <b>Open</b> cases?                  |
| <b>1.8</b>  | Was the proper CANO template used for <b>Closed</b> cases?                   |
| <b>1.9</b>  | Was the proper notice template used for <b>Closed</b> cases?                 |
| <b>1.10</b> | Were all the necessary case numbers worked?                                  |
| <b>1.11</b> | Were all items correctly deleted from or left in the Work Queue?             |

**1.12** Was the Current Task dispositioned correctly for each case action?

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